

MOMENTUM NONPROFIT PARTNERS STATEWIDE EXPANSION PLAN

SEPTEMBER 2023

INTRODUCTION

This report outlines a strategic plan for the development of a statewide nonprofit association through the expansion of Momentum Nonprofit Partners in Memphis, Tennessee. Informed by Momentum Nonprofit Partners' existing achievements and a range of compelling evidence, the expansion plan describes programming, phasing, structuring, and funding. This report was compiled by consultants Elle Benson and Sara Baker.

BACKGROUND

Momentum Nonprofit Partners supports the nonprofit sector in creating equitable, measurable, and lasting change. Ensuring nonprofits have an equal seat at the table alongside government, business, and philanthropy has been a critical part of that work, but it has become increasingly apparent that Memphis nonprofits cannot make much-needed statewide change alone. One of Momentum's guiding principles is that when nonprofits get better, the community gets better. Inspired by their mission, vision, and principles, Momentum's team realized nonprofits across the state needed the kind of support their Memphis membership benefits from in order to create change that would ensure an equal seat at the table. Without someone to fill this gap across Tennessee, nonprofits in all of the state's regions would continue to be limited by a lack of effective solidarity around state policy issues, regional strategy and knowledge exchange, and statewide collaboration.

Tennessee is the largest state in the US without a statewide nonprofit association. Historically, four regional nonprofit associations have existed across the state, each providing similar services such as training and technical assistance to their individual service areas in and around Memphis, Nashville, Knoxville, and Chattanooga. They have also worked collaboratively to provide public policy and advocacy support and statewide convenings.

Post-COVID, this landscape shifted, however. Three of the regional associations experienced changes, such as mergers, leadership transitions, and, in the case of Venture Forward, sunseting. This reduced capacity to engage in statewide issues has left a gap in support for nonprofits locally and statewide. It makes it more difficult for organizations to make legislative change because there are no reliable mechanisms for statewide organizing. Moreover, rural organizations have not been fully represented by metro-area associations.

To fill this urgent need that aligns with the organization's values, Momentum Nonprofit Partners has announced expansion plans to serve as the first statewide nonprofit association. The organization's goal

in the expansion is to provide consistent public policy support, advocacy, and research for the entire Tennessee nonprofit sector at the state and federal level. In most parts of the country, statewide nonprofit associations provide holistic services to nonprofits, such as statewide public policy and advocacy support, training and technical assistance, and research on relevant issues. Such support would create new opportunities for Tennessee nonprofits to collectively advocate for themselves and build knowledge to increase their impact.

As Momentum expands its reach to serve as the state nonprofit association, engaging Tennessee nonprofits will be as important as ever as we build a large, statewide alliance. *Nonprofits are Tennessee's 6th largest industry, and the sector pays more than \$13.5 billion in wages each year to 181,300 Tennesseans. That's 8% of the state's workforce. Tennessee nonprofits generate more than \$31.6 billion in revenues each year and hold assets of almost \$71.4 billion, accounting for 10% of the Gross State Product.* With nonprofits providing vital services to communities in Tennessee and contributing significantly to employment and revenue, the sector needs a statewide leader to advocate for nonprofits at the state level and provide consistent, coordinated resources.

Many of the root causes of poverty, crime, homelessness, and even nonprofit ineffectiveness are exacerbated by potentially harmful policies that are not crafted through a nonprofit lens. For example, the 2017 tax reform bill gutted the Universal Charitable Deduction, which let average Americans itemize their charitable contributions. The repeal of this law has cost nonprofits in the US more than \$15 billion in lost individual contributions each year since. *Imagine the lost contributions in Tennessee that could have addressed root causes directly and increased the capacity of nonprofits to better support underserved communities.* Furthermore, a lack of comprehensive data on issues that impact nonprofits impairs the ability of our local and state legislators to make educated policy decisions on behalf of the organizations in our communities.

From a public policy perspective, nonprofit collaboration is essential. Organizations have a unique role to play in collectively advocating to strengthen policy by amplifying powerful community voices. Grassroots advocacy is nearly impossible from only one part of the state. With a supermajority in our state legislature and hyper-partisanship at both state and federal levels—and without a state association spearheading a collective coalition to herald the voices of the rural, metro, and regional nonprofits—these organizations are at a major disadvantage.

Momentum has already led numerous state policy initiatives and mobilizations, and a statewide coalition will allow Tennessee nonprofits to have a bigger policy impact. One of the core pillars of this work will be to enable strategic problem-solving for community outcomes and promote intentional investments across the sector by building knowledge of Tennessee's nonprofit work and challenges through data sharing and convenings. Additionally, the statewide nonprofit association seeks to equip nonprofits to do their own advocacy, thus strengthening the sector's ability to catalyze equitable, thriving, and just communities.

To address vital policy issues, nonprofits must be part of a unified coalition across the state while nurturing a relationship with policymakers at the city and county levels. When the COVID-19 pandemic began in 2020, the urgent need to bring our collective voices to the table, particularly at the state level,

became painfully apparent. Three key events from that period led many of us to think more deeply about the need for policy and advocacy support. These include:

- **Tennessee COVID-19 Recovery Act**

- Problem: Nonprofits were left out of the original bill that evolved into the Tennessee COVID-19 Recovery Act. In the original draft of the bill, for-profits and healthcare institutions were protected from unnecessary COVID-19 litigation, but a loophole could have limited nonprofits' protection under the bill.
- Impact: The four regional nonprofits that existed at the time were able to mobilize their members to advocate for the inclusion of nonprofits. Thanks to their advocacy, every nonprofit in the state of Tennessee was protected under the new law, potentially resulting in millions of dollars saved in unnecessary legal fees.

- **Economic Recovery Group**

- Problem: During the reopening process after the nationwide shutdown, nonprofits found themselves without representation on the Governor's Economic Recovery Group (ERG).
- Impact: Again, the regional associations mobilized their members to advocate for representation, leading to the creation of a nonprofit subcommittee that provided recommendations to the Governor's office. Thanks in part to the recommendation made by the subcommittee, the Governor eventually released \$150 million through the Tennessee Community CARES fund to nonprofits.

- **Vaccine Distribution**

- Problem: Issues with vaccination distribution arose across the state, and communication was fractured and siloed. Although nonprofits have access to marginalized groups that could benefit from information dissemination, many organizations were not fully informed of the vaccine distribution process.
- Impact: In response to this confusion, the four regional nonprofit associations worked together to provide a virtual statewide town hall with representatives from the State of Tennessee to demystify the rollout process.

STATEWIDE COLLABORATION

Prior to 2018, the four regional capacity centers operated independently, lacking communication channels, collaboration, and alignment of services. They worked in silos and had never met. However, in 2018, a significant turning point occurred when all four centers convened in Nashville to initiate discussions.

By 2019, some broad partnerships were formulated, allowing members of any regional center to access reciprocal benefits. Furthermore, during the same year, the CEOs began exploring the possibility of extending health insurance coverage to all nonprofit organizations in Tennessee. The Department of Insurance stipulated that a state association would need to be established and operational for a minimum of five years before offering health insurance. Notably, substantial investments would also be required to mitigate initial health insurance claims. The prevailing mindset was one of collaboration and collective support throughout Tennessee.

Then, in March 2020, the unexpected arrival of the COVID-19 pandemic prompted the four regional centers to launch coordinated efforts aimed at supporting nonprofits. These efforts included disseminating crucial information, assisting with PPP loan preparations, advocating for legislative actions, and more. The urgency created by the pandemic compelled the regional centers to come together, resulting in stronger working relationships and enhanced trust.

In 2022, the CEOs revisited discussions about establishing a statewide association. Their decision was influenced by the valuable experience gained through collaboration and the positive impact it had across the state. They foresaw the challenges both nonprofits and regional associations would face without a more coordinated effort post-COVID, and they knew that the previously mentioned changes coming to three of the regional associations would affect their ability to work as collaboratively as the post-COVID environment required.

VALUES

As we drive forward in this movement, we hold the following values and guiding principles as our goal post for how we will serve and support the nonprofit sector in Tennessee.

We work towards a future where:

- Nonprofits have an equal seat at the table alongside government, businesses, and philanthropy and we are united to solve community problems.
- Nonprofits are effective and sustainable.
- Nonprofit leaders reflect our community demographics—in other words, a sector with representative leadership.
- A high-quality nonprofit workforce is the norm—where individuals are reaching their maximum potential and are motivated to continue to work for the greater good.

GUIDING PRINCIPLES

- When nonprofits get better, the community gets better.
- Remarkable people produce remarkable results—talent matters.
- Be inclusive, accessible, and value all voices.
- Continuous improvement and accountability bring the highest impact possible.
- Promote equity and justice in every action.
- Drive our daily work and long-term vision by the needs of nonprofits and the Tennessee nonprofit sector.
- Collaborate, convene and partner to further our mission.
- Challenge and disrupt entrenched thinking for positive change.
- Embody the change we want to see.

METHODOLOGY

CONSULTANTS

Momentum Nonprofit Partners hired two consultants to support the development of the expansion plan from June through September 2023, Elle Benson and Sara Baker.

Elle Benson, Nashville

Elle Benson is a national nonprofit consultant helping nonprofits transition to greater impact. Benson has worked her entire career with nonprofit organizations and organizational development consulting firms including the Center for Nonprofit Management, LBMC, Alliance for Better Nonprofits, and the YWCA Knoxville / Tennessee Valley. Her experience includes organizational development and change, fundraising, program development, nonprofit marketing, human resources, board governance, and strategic planning. Benson is an enthusiastic teacher, having taught at the Alliance for Better Nonprofits and University of Tennessee non-credit courses. She engages and energizes audiences from 20 to 200, and her [2020 TEDx video A Crash Course in Learning to Laugh](#) has propelled her as a desired keynote speaker. She has published two books around mindfulness, [Cultivate Your Happiness: Mama-to-Be and Cultivating Calmness in Children](#) for early education aged youth. Benson holds a certification in board governance from [BoardSource](#), an MBA in organizational change, and a BA in business. She serves as the Board President for the Association of Infant Mental Health in Tennessee and has served with Friends of Literacy, City People, Young Professionals of Knoxville, Knoxville AMA, and countless committees.

Sara Baker, Knoxville

Sara Baker is a nonprofit consultant who focuses on organizational strengthening. Using approaches rooted in justice and equity, she helps nonprofits improve their mission alignment, strategies, impact, efficiency, culture, and resource mobilization. She designs support offerings that center organizational context and team members' lived experiences in order to create sustainable, people-centered change. Baker loves helping teams determine the arc of their nonprofit's story in a way that transforms broader narratives about the communities they serve by prioritizing community agency and resilience. She has led capacity building for nonprofits, government departments, networks, and collectives from Argentina to Zimbabwe. She also does research, writing, and facilitation on a variety of issues at the intersection of tech, data and social justice and also has expertise in remote facilitation and ethical approaches to data collection, storage, and use. Currently, she serves as a trainer for Nethope's Digital Leadership Institute for humanitarian workers. Baker's work has been featured in outlets like the Washington Post and received awards such as the Bobs People's Choice Award for Best Online Activism. She holds an MA in Creative Writing and has served as a board member or volunteer with such groups as the United Way of Greater Knoxville, Tennessee Stage Company, Mental Health Association of East Tennessee, Friendship House, and Alliance for International Women's Rights.

LISTENING AND INFORMATION SESSIONS

Kevin Dean of Momentum Nonprofit Partners and consultants Elle Benson and Sara Baker held several listening and information sessions with local partners across the state in July and August. These included in-person sessions in Nashville, Chattanooga, Jackson, and Knoxville and a remote session for rural nonprofits. The purpose of these sessions was to provide information on the need for a statewide nonprofit association, the expansion work done by Momentum so far, and plans for the future, to gather information on local needs and priorities, and to give nonprofits and regional support organizations an opportunity to ask questions.



EXPANSION TASK FORCE

A growth-focused task force was established to provide backing for the planning and strategic aspects of the expansion initiative. Momentum gathered a varied assembly of nonprofit stakeholders to listen to the proposal and subsequently assess the initial growth plan, making necessary edits and adjustments. The task force is comprised of:

- Torrie Boggs, United Way of Greater Knoxville
- Sonji Branch, Momentum Nonprofit Partners Board of Directors
- Claudia Caballero, Centro Hispano
- Hal Cato, Community Foundation of Middle Tennessee
- Teresa Cheeks-Wilson, Momentum Nonprofit Partners Board of Directors
- Mary Darby, Think Tennessee
- Kevin Dean, Momentum Nonprofit Partners
- Abby Garrison, United Way of Chattanooga
- Mary Graham, United Ways of Tennessee
- Sumita Keller, Healing Trust
- Andrea Hill, Momentum Nonprofit Partners
- Janet Lo, Shelby County Government
- Wanda Lyle, Center for Nonprofit Management
- Jasmine Miller, United Way of West Tennessee
- Sutton Mora, Community Foundation of Greater Memphis
- Jim Snell, Volunteer Tennessee

Location	Attendees
Nashville	192
Chattanooga	54
Knoxville	14
Rural	41
Jackson	52
Memphis	75

- Brian Straessle, Sycamore Institute
- Wendy Wand, United Way of Blount County

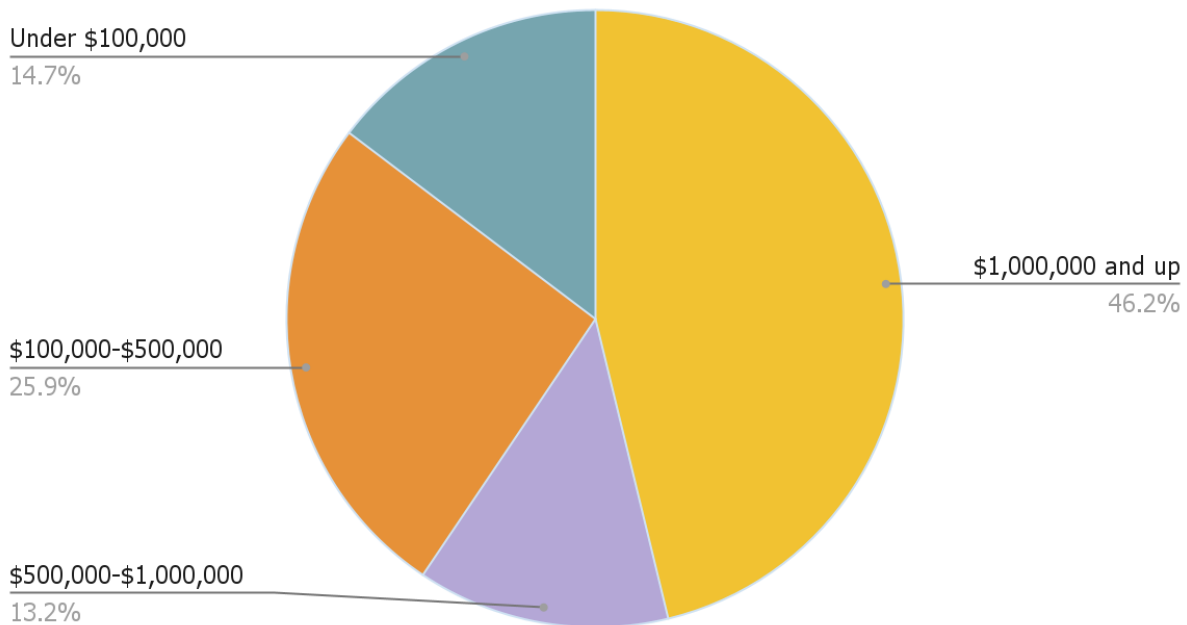
ONLINE SURVEY

During the listening and information sessions, we shared an online survey with participants in order to collect more information on their priorities. Additionally, regional support organizations and local nonprofit session participants sent the survey out to their partners and networks. We also promoted the survey via email and social media platforms like LinkedIn.

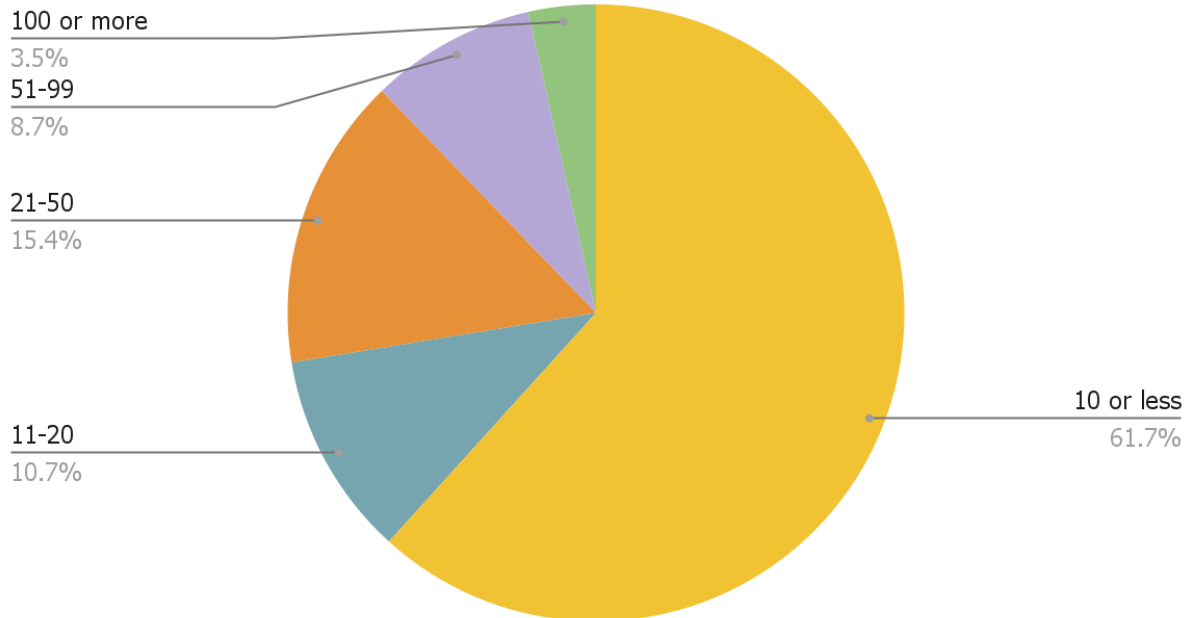
The survey included seven questions on the participating nonprofit's details (e.g., name, budget size, service provided); sections devoted to rating the urgency level of seven key service areas, prioritization ranking of suggested policy issues, research topics, and implementation phases; and an open-ended question inviting respondents to share questions, concerns, and ideas.

A total of 198 individuals from 181 nonprofit organizations and funders submitted survey responses. The nonprofits they represent break down as follows:

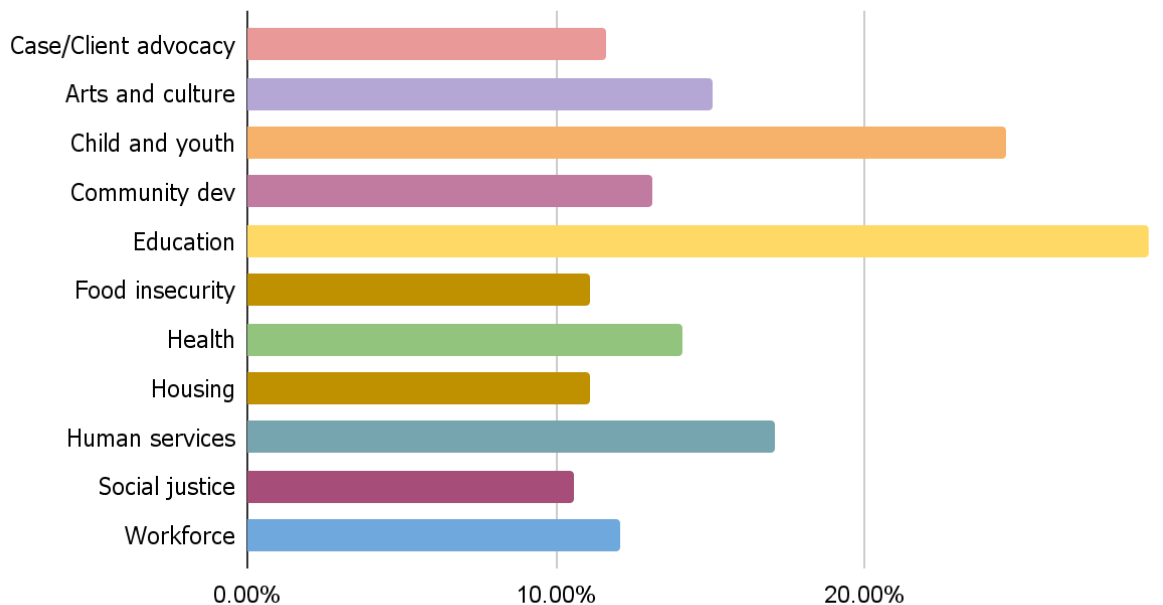
Budget size



Staff size



Service category



Additional service categories, all below 10% of responses, include alcohol and drug treatment, animals, associations (chamber, neighborhood), cemetery, community garden, criminal justice, disabilities, domestic violence, early childhood, environment, higher education, HIV/AIDS, homelessness, legal, LGBTQ+, literacy, medical, mental health and crisis intervention, mentoring, museums, philanthropy,

policy advocacy, recreation and sports, refugees and immigrants, religious/faith-based, teen pregnancy, veterans, and unspecified other.

Many respondents are members of regional support associations. The largest percentage (42.3%) belong to the Center for Nonprofit Management, while 28% are members of Momentum, 27% of Alliance for Better Nonprofits, and 8% of now-sunset Venture Forward.

FUNDERS' SESSION

Aside from conducting listening sessions and information-sharing events for nonprofits, it was crucial to involve funders from all over the state to understand their viewpoints and secure their support. The Community Foundation of Middle Tennessee took the initiative to organize a donor forum, during which 14 donors actively participated by posing insightful questions and providing feedback. Kevin also embarked on a journey across the state and held meetings with 13 more funders outside of Nashville. These interactions were overwhelmingly positive, reflecting a genuine enthusiasm for the expansion efforts across the entire state.

MODELS

In addition to compiling local data, we explored the structure, programming, and achievements of statewide organizations in other states that could serve as models for the statewide nonprofit association. We have included highlights of these associations below.

- **National Council of Nonprofits (NCN)**: The largest association of nonprofits in North America, NCN focuses on three key pillars: championing, connecting, and informing. Their public policy work involves identifying opportunities and threats to the sector, spotting patterns, leveraging local and regional successes, working with the media, and providing evidence. They bring nonprofits together to exchange strategies and increase advocacy, and they are a trusted resource on issues in the sector. During the pandemic, NCN saved 6.2 million nonprofit jobs by advocating for \$50 billion in forgivable PPP loans from Congress for nonprofits.
- **Kentucky Nonprofit Network (KNN)**: With a robust employee benefits program, KNN offers health insurance plans for members, a critical solution for the many small nonprofits in Kentucky that cannot afford their own plan for employees. KNN also advocated for the creation of the state's nonprofit caucus, ensuring legislators are informed and engaged on issues that affect their members, such as tax policy and public-private partnerships.
- **Maryland Nonprofits**: This year Maryland Nonprofits successfully advocated for a law requiring state agencies to reimburse nonprofits' grant-funded expenses on time or else pay interest to the nonprofits, a big win for organizations with struggling budgets due to consistently late payments from the state. They also launched a campaign to establish a Nonprofit Sustainability Fund of \$100 million within the state's Department of Commerce.
- **Michigan Nonprofit Association (MNA)**: MNA worked with nonprofits across Michigan to ensure that the 2020 census accurately represented historically undercounted communities. Their unique benefits to members also include technology services around IT, security, and more.

- **Florida Nonprofit Alliance (FNA):** With a new law that bans certain topics related to diversity causing confusion in Florida, FNA is helping nonprofits understand how the law affects their diversity, equity, and inclusion initiatives. They also publish handy resources, such as research on individual charitable giving, a nonprofit compensation survey, and reports on the economic impact of the state’s nonprofits, giving organizations more leverage in advocacy and funding.

KEY PARTNERS

The following partners were instrumental in helping us understand needs and interests across the state, connecting us to local nonprofits, and giving guidance.

- Center for Nonprofit Management
- Community Foundation of West Tennessee
- Community Foundation of Greater Memphis
- Community Foundation of Middle Tennessee
- Community Foundation of East Tennessee
- Healing Trust
- Maryville College
- Sycamore Institute
- Think Tennessee
- United Way of Anderson County
- United Way of Chattanooga
- United Way of Greater Knoxville
- University of Tennessee
- Volunteer TN

EXPANSION PLAN

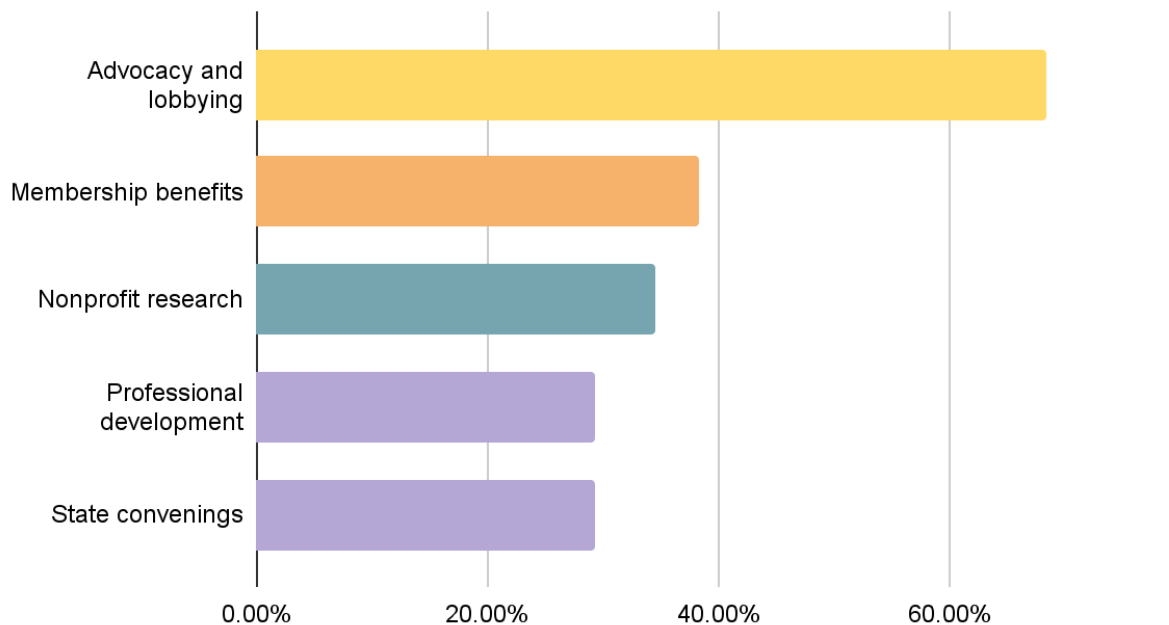
PROGRAMMING

Programming plans aim to ensure collective advocacy, increased state funding, standardization of best practices, curated learning and resources, peer support and innovation, rural support and access, and timely and accurate information and messaging. As shown below, programming will be split into two key areas: sector building and capacity building.

Nonprofit sector building	Nonprofit capacity building
<ul style="list-style-type: none"> ● Public policy and advocacy support ● Information dissemination ● Research ● Conferences 	<ul style="list-style-type: none"> ● Online learning and professional development ● Organizational assessment ● Standards for Excellence ● Consultant directory ● Additional online resources

Listening session participants and survey respondents were keen to learn more about expected service offerings from the statewide nonprofit association. Rural representatives expressed particular interest in opportunities to build connections and collaboration. Participants at several listening sessions mentioned the need for health insurance options as a membership benefit. When survey respondents were asked to rank service offerings by importance, advocacy and lobbying outranked other offerings considerably.

Service offerings by importance



Percentage of people who ranked each offering 1 or 2 out of 5.

MEMBERSHIP

Membership in the statewide nonprofit association will offer a dynamic platform for collaboration and growth. Through monthly virtual convenings, members will be able to engage in insightful discussions, sharing expertise and best practices. Being able to connect with other nonprofits will be a critical component, as more than half of survey participants reported creating new collaborations, strategic alliances, and statewide coalitions to further their mission as high priority. Additionally, regional advisory boards will ensure localized relevance and foster connections within diverse communities.

In a commitment to inclusivity, the first year will be free for all nonprofits, encouraging participation regardless of financial constraints. After three years, a pay-what-you-can membership fee structure or tiered membership structure will be assessed as possible methods of continuing to promote accessibility, allowing organizations to contribute based on their capacity. This approach will empower nonprofits to access valuable resources, build meaningful networks, and collectively amplify their impact, ultimately strengthening the nonprofit sector across the state.

In order to obtain membership, nonprofits must:

1. Have 501(c)3 status
2. Have a board with at least three members, including a Board Chair and Board Secretary, per state law
3. Not be considered a hate group

PUBLIC POLICY AND LEGISLATIVE ACTIVITIES

Nearly half of survey respondents (47.4%) reported that public policy and advocacy is a high priority, and another 35.4% marked it as a medium priority. While 15.6% said public policy and advocacy is a low priority, some of the comments reveal confusion around the type of advocacy the statewide nonprofit association plans to engage in and how advocacy would benefit their nonprofits. Listening sessions participants were eager to have the statewide nonprofit association support their nonprofits in understanding the difference between advocacy and lobbying and why advocacy should be part of a nonprofit's work. In fact, 20.1% of survey respondents ranked "educating your staff, board, and advisory board members on what your organization can and cannot do regarding public policy" as high priority, with 39.1% at medium priority. Clearly, there is great potential for educating and galvanizing local nonprofits across the state for policy advocacy purposes. The statewide nonprofit association's advocacy focus will be on issues that affect the nonprofit sector rather than sub-sector concerns, but the team will monitor all legislation that may impact nonprofits and the communities they serve.

"I'm seeing that we have power we don't use. Collective power."
Knoxville listening session participant

Given Momentum's existing work in this area, the statewide association will provide the following public policy and advocacy activities:

- **Public Policy Action Network:** Comprised of nonprofit partners, funders, and government officials, the Public Policy Action Network will develop a collective approach to nonprofit sector advocacy. This coalition will be at the center of legislative action, including reviewing upcoming legislation, drafting new legislation, developing plans of action to promote or defend nonprofits, and promoting fair representation of the Tennessee nonprofit sector at all state policy discussions and grant programs.
- **Bipartisan Nonprofit Caucus:** The statewide nonprofit association will convene a coalition of legislators to serve as champions for nonprofits in the state. Similar to Kentucky's nonprofit caucus, Tennessee's caucus will be a bipartisan, bicameral group focused on legislative and regulatory issues affecting nonprofits across the state. These issues may include tax policy, spending priorities, public-private partnerships, and laws governing nonprofits. Caucus members can help to educate their fellow legislators on nonprofit priorities and contexts, decreasing the likelihood of legislators introducing bills without including nonprofits in the process.
- **Legislation Tracking and Monitoring:** The statewide nonprofit association will more closely and actively monitor legislation and discourse at the state and federal levels to identify developments early in the game and enable nonprofits to understand trends, share vital information, and take action.
- **Educating Nonprofits and Legislators:** The statewide nonprofit association will continue to educate the nonprofit community about their important nonpartisan role in civic engagement

and public policy. A whopping 92% of survey respondents said that raising awareness of their nonprofit with legislators and funders is a high or medium priority, and the statewide nonprofit association aims to increase nonprofit visibility among elected officials.

“Not enough organizations are asking questions about what legislation might affect them. Many are wary to even call someone in the state legislature.”

Knoxville listening session participant

- **Nonprofit Day on the Hill:** Currently, Momentum runs Bluff City Day on the Hill, an opportunity for nonprofit staff and board members in the Memphis area to meet with elected officials and advocate for the sector while educating our electors about the work that our organizations do. A broader Nonprofit Day on the Hill will be a two-day event that serves as a source of inspiration and a vital link between and among the nonprofit sector and leaders in the Tennessee General Assembly. The first day will consist of an Advocacy Summit for participants, while the second day will see nonprofits descending upon the Hill to meet with their elected representatives.
- **Introduction of Legislation:** The statewide nonprofit association’s work in this area will be more proactive than reactive. Partnering with legislators individually and through the caucus to introduce new legislation will benefit nonprofits throughout Memphis and the state. A sister organization, Maryland Nonprofit Association, recently successfully introduced government contract reform legislation. Today, nonprofit organizations in that state are guaranteed on-time payment of reimbursements from the state—or the state pays the nonprofits interest! One of our survey respondents said government payments have been consistently eight months late for the past two years, while other organizations we spoke to have had to take out loans to make up the difference while awaiting overdue reimbursement. Similar legislation in Tennessee could keep nonprofits financially solvent.

INFORMATION DISSEMINATION

Through targeted communications (social media, website, monthly newsletters, blogs and podcasts), webinars, and workshops, Momentum already facilitates a comprehensive understanding of nonprofit-related topics, equipping organizations with the knowledge and tools needed to navigate challenges and seize opportunities. Through these and other tools, the statewide nonprofit association will disseminate crucial, timely information to nonprofits throughout the state, fostering informed decision-making and collective progress. By curating and distributing national data, research findings, and legislative agendas, we can ensure that nonprofits stay abreast of emerging trends, best practices, and policy developments. This commitment to transparent, accessible, and timely information builds nonprofit capacity to drive positive change, advocate effectively, and maximize their impact within their communities and beyond.

NONPROFIT SECTOR RESEARCH

The statewide nonprofit association will engage in research that increases understanding of the strengths and needs of the sector, informs funding priorities, and guides advocacy efforts. Current examples of Momentum’s research include the State of the Sector report, Nonprofit Compensation

Report, and the Workforce Shortage Survey. These will be expanded to collect and analyze statewide data, and other research topics will be addressed as well.

Survey participants ranked research topics in order of importance as follows:

1. **Statewide needs assessment (tie):** Identification of the specific challenges faced by nonprofits to help resource allocation
1. **Funding landscape (tie):** Information on funding sources, trends, gaps, and recommendations as a state
2. **Compensation data:** Current salary and employee benefit data
3. **Impact assessment:** Evaluation of the social and economic impact of collective initiatives
4. **Nonprofit workforce:** Staff retention, job availability, and skill readiness
5. **Policy & advocacy:** Policy issues affecting nonprofits at the state level
6. **Sector analysis:** Identification of sector size, scope, and diversity to better understand duplication and growth opportunities

The statewide nonprofit association will work with [Sycamore Institute](#) to conduct and publish research specific to the needs of Tennessee nonprofits. Sycamore is an independent, nonpartisan public policy research center that equips Tennesseans with data-driven resources to identify, understand, and solve big challenges. In addition to impartial policy analysis on public finance, health, financial security, education, criminal justice, transportation, and other issues, Sycamore also consults with nonprofits, foundations, and other institutions to inform their strategic plans, grant applications, and day-to-day operations.

STATE CONFERENCE

Momentum has executed five Mid-South Nonprofit Conferences aimed at addressing barriers, solutions, and best practices within the nonprofit sector. Moving forward, the conference will be statewide and held in a different city each year. Future conferences will involve similar aims and allow nonprofits from different parts of the state to get to know each other and explore opportunities for collaboration, networking, and solidarity. A total of 86% of survey respondents said creating new collaborations, strategic alliances, and statewide coalitions to further their mission is a high or medium priority. Notably, nonprofit representatives at the rural listening session expressed a potential need for assistance with conference travel costs to ensure that they can participate.

Conference Locations

2024

West TN

2025

East TN

2026

Middle TN

ONLINE LEARNING AND PROFESSIONAL DEVELOPMENT

Momentum already provides several online learning modules for individual nonprofit staff, including their signature series Nonprofit Board Essentials. Additionally, Momentum partners with MindEdge, a leading adult education company, to provide additional online professional development opportunities and with Nonprofit Leadership Alliance to provide CNP certifications to local nonprofit leaders. All of these learning opportunities will be available to members across the state under the statewide nonprofit association.

ORGANIZATIONAL ASSESSMENT

Momentum Nonprofit Partners licenses 501 Commons' free organizational assessment tool, and this will continue as part of the statewide expansion. The assessment tool looks at five elements through a self-reporting model:

1. Strong governance and oversight
2. Good management and a healthy organizational culture
3. The resources to carry out your mission and accountable management of funding
4. Communications and relationships with funders, clients, and partners
5. Efficient and effective programs, services, and administrative systems

Organizations across the state will be able to take the assessment free of charge to evaluate their operational efficiency, effectiveness, and alignment with their mission. This process identifies strengths, weaknesses, and areas for improvement, enabling informed decision-making, resource allocation, and strategic planning. It fosters growth, enhances accountability, and ensures the organization remains responsive to evolving needs. By gaining insights into its internal workings, a nonprofit can optimize its impact, build stakeholder trust, and drive positive change within the community it serves.

Additionally, organizations needing one-on-one facilitation of the results can do so for a nominal fee. The statewide nonprofit association can also consolidate findings derived from the organizational assessment. The advantages of examining both the comprehensive dataset and its individual subsections will enable the association to tailor capacity-building assistance according to the specific requirements of nonprofits in Tennessee.

STANDARDS FOR EXCELLENCE RESOURCES

One of the gaps nonprofits in Tennessee face is a lack of standardization around best practices. Momentum—and therefore, the statewide nonprofit association—holds the state license for the Standards for Excellence, which aims to raise the level of accountability, transparency, and effectiveness of all nonprofit organizations to foster excellence and inspire trust. The Standards for Excellence code provides a framework and step-by-step guidelines to achieve a well-managed and responsibly governed organization around mission, leadership, legal compliance, finance development, and public awareness. Members will be able to access the code, a variety of useful templates, and accreditation through the statewide association.

CONSULTANT DIRECTORY

The statewide nonprofit association will provide a searchable directory of vetted consultants to help nonprofits meet their needs in a variety of areas. This benefit will complement the association's other capacity building by ensuring that nonprofits are connected to Tennessee-based experts.

PHASING OF PROGRAMMING

Rolling out state-wide programming in stages is a strategic imperative that underscores the organization's commitment to delivering high-quality programming and ensuring long-term sustainability. By taking a phased approach, the statewide association can meticulously design and refine each program, prioritizing excellence over rapid expansion. This deliberate strategy allows for thorough testing, evaluation, and refinement of program content, delivery methods, and impact measurement. Simultaneously, building a robust internal infrastructure in alignment with each stage guarantees efficient operations, effective communication, and streamlined resource allocation.

PHASES

LAUNCH PHASE: JANUARY–JUNE 30, 2024

- Marketing and branding
- Hiring of new staff
- Policy monitoring
- Nonprofit Day on the Hill/Advocacy Summit (February 27 & 28th, 2024)
- Public Policy Action Network
- Regional summit
- Information sharing (national, state)

PHASE 1: JULY 2024–JUNE 2025

- Advocacy and policy education
- Monthly statewide convenings (virtual)
- Statewide conference
- Quarterly statewide convenings (virtual)
- Focus on recruitment and engagement
- Sector research (compensation study)
- Regional advisory councils implemented and new statewide board launched (July 1, 2024)
- Increased online training and digital resources (toolkits, white paper)

PHASE 2: JULY 2025–JUNE 2026

- Regional convenings (affinity groups)
- Consultant directory expansion
- Increase of partner benefits
- Nonprofit Academy & other statewide cohort-based learning (virtual, potentially in partnership with regional nonprofit associations)
- Development of a new online course

PHASE 3 JULY 2026–JUNE 2027

- Increase of collaborative funding statewide
- Cohort building for Standards for Excellence accreditation
- Continuous improvement and long-term planning

STRUCTURE AND EXPANSION

BOARD GOVERNANCE

As Momentum Nonprofit Partners expands its reach statewide, the governance model will undergo a transformation. The upcoming governance framework will encompass 15 board members, distributed across West, Middle, East Tennessee, plus at-large members. The new board of directors model in Tennessee is designed with a strategic approach to ensure representation, diversity, and effective governance. The key features of this board model are as follows:

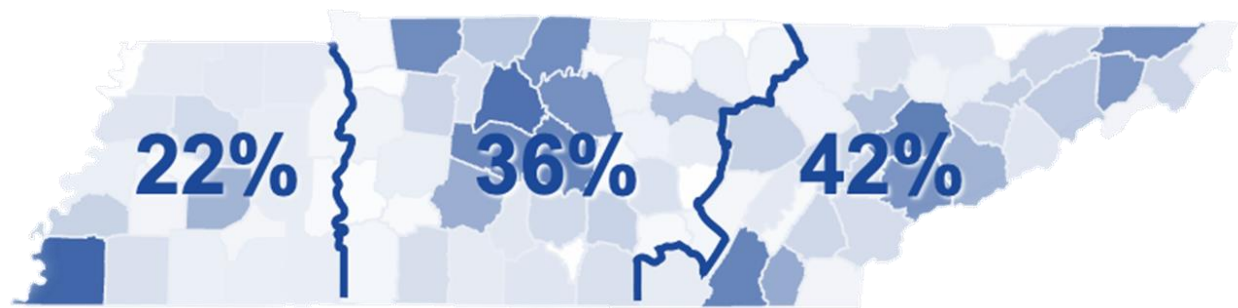
1. Governance Structure

Board members will serve three-year terms with the opportunity to renew their term once, allowing for a maximum of six consecutive years of service. This term structure ensures a balance between continuity and fresh perspectives within the board. As the founding board is developed, the initial terms will be staggered between two, three, and four years to ensure sustainability and rotating terms.

2. Geographical Representation

The board is composed of representatives from different geographic areas to ensure a wide range of perspectives. Geographical representation will be assigned based on the latest census data for population. Specifically, there will be three members from West, four members from Middle, and five board members from East, along with three at-large board members. Each region must have at least one rural representative. This approach enhances inclusivity and ensures that the interests and needs of various parts of the state are considered. The bylaws will state that the board's geographical

representation will be evaluated routinely to ensure the initial design still meets the needs.



Tennessee population distribution, Sycamore Institute

3. Regional Councils

There will be four regional councils: West, Middle, Northeast, and Southeast (a fifth council specific to rural needs may be instituted should the need arise). These councils are envisioned to consist of 9-15 members, encompassing a wide range of nonprofit organizations and stakeholders, ensuring diversity. Quarterly meetings will be held by the advisory councils to facilitate collaborative discussions and actions.

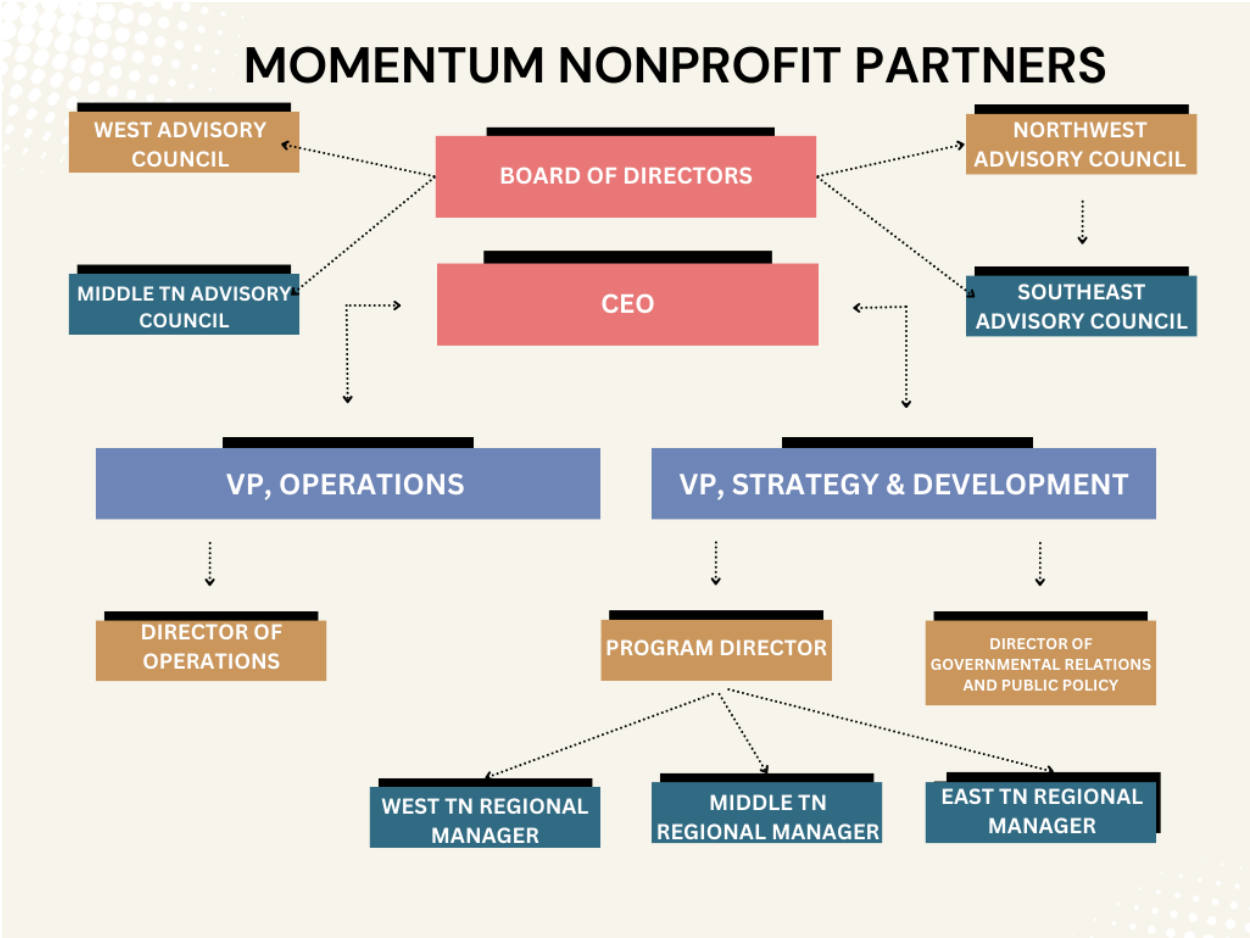
4. Meeting Schedule

The board will meet four times per year, with three held virtually and one conducted in person. This mix of virtual and in-person meetings allows for efficient communication and collaboration while also providing the opportunity for direct interaction among board members. Limiting travel also makes it easier for people to join the board.

A sub-committee will begin restructuring the organization's bylaws and recruitment process in the fall of 2023.

STAFFING

Momentum Nonprofit Partners will strategically realign their existing team of seven to address the requirements of the statewide expansion. They will also hire two additional staff members in July 2024. The current staff possesses strong executive skills, a deep passion for their work, and a remarkable track record of achievements.



GOALS

LAUNCH PHASE: JANUARY–JUNE 30, 2024	MEASURABLE GOAL
Marketing and branding	Launch an awareness campaign with the goal of registering 200 new nonprofit partners.
Hiring of staff	Write job descriptions, source talent, and make offers to new staff members.
Policy monitoring	Create internal systems of legislative tracking and communication to inform nonprofits of upcoming action alerts.

Nonprofit Day on the Hill/Advocacy Summit	Mobilize 100 nonprofits in Nashville to advocate on the Hill.
Regional summit (Chattanooga)	Convene 75 nonprofit leaders for the first initial regional summit.
Information sharing (national, state)	Curate at least four crucial information memos/action alerts/policy briefings and distribute across the state.
PHASE 1: JULY 2024–JUNE 2025	MEASURABLE GOAL
Public Policy Action Network	Develop and launch the PPAN with at least 50 nonprofits across all sub-sectors.
Advocacy and policy education	Train at least 150 nonprofits on advocacy efforts. Institute at least three educational campaigns to legislators.
Monthly statewide convenings (virtual)	Host monthly convenings with an average attendance of 100 nonprofit leaders.
Statewide conference and awards (Chattanooga)	Host conference in Chattanooga with 300 nonprofit leaders present.
Quarterly statewide convenings (virtual)	Launch the convenings with educational content and areas of discussion with an average of 100 attendees.
Focus on recruitment and engagement	Raise membership levels by 33% in the first year from the start-up phase.
Regional advisory councils implemented	Create leadership and structure to launch the regional advisory councils with diverse representation.

New online course developed	Based on member feedback, create one new additional online course.
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CONCLUSION

Momentum Nonprofits Partners has significant evidence detailing community need and interest level in creating a statewide nonprofit association from major cities and rural areas across Tennessee. The statewide nonprofit association's expansion strategy has been driven by identified gaps—spotting a need or problem and developing a solution-oriented approach. With this strategic document in hand to guide next steps, the statewide nonprofit association can now focus on filling those gaps. Nonprofits around the state are looking forward to the variety of benefits and sustainable change Momentum's expansion can promote while continuing to be an effective service provider to Memphis nonprofits.

“This plan gives me a lot of motivation and encouragement that we can accomplish everything we’re trying to do here in Chattanooga.”

Chattanooga listening session participant

FROM THE CONSULTANTS

We are honored to support Momentum in gathering information from a range of stakeholders about the need for a statewide nonprofit association. From our research and conversations across the state, this endeavor will change the social sector landscape tremendously. Here are some compelling reasons for Tennessee to consider this initiative:

- **Strengthening the nonprofit sector:** This state association can play a pivotal role in strengthening the overall nonprofit sector in Tennessee. By providing support, resources, and guidance to nonprofit organizations, it can help thousands to become more effective, sustainable, and responsive to community needs.
- **Advocacy and public policy influence:** Nonprofits often face challenges related to regulations, funding, and public perception. A statewide association can serve as a unified voice for the sector, advocating for policies that are favorable to nonprofits. This includes tax incentives, grant opportunities, and regulatory reforms that can make it easier for nonprofits to operate and fulfill their missions.
- **Networking and collaboration:** Facilitating networking opportunities among nonprofits can foster collaboration and the exchange of critical knowledge. Through conferences, workshops, and online platforms, the state association can create spaces for nonprofits to connect, collaborate, learn from, and inspire one another. This can lead to innovative solutions and more efficient resource allocation.

- **Resource sharing:** The state association can centralize resources to reduce duplication of efforts and save time and money for individual organizations.
- **Improved funder and public trust:** When nonprofits work together under the umbrella of a well-established association, it can enhance public trust. Donors and supporters may have more confidence in nonprofits that are part of a recognized association committed to transparency and best practices.
- **Response to emergencies and crises:** State associations can play a crucial role in coordinating the efforts of member organizations during emergencies or crises, such as natural disasters and pandemics. This ensures a more organized, equitable, and efficient response that meets community needs.
- **Data and research:** The association can collect data and conduct research on the nonprofit sector in Tennessee. This information can be invaluable for nonprofits, policymakers, and funders in making informed decisions and ensuring that policies and solutions respond to identified needs.
- **Economic impact:** Nonprofits make a significant contribution to the state's economy. By supporting and promoting the growth of nonprofits, the association can indirectly contribute to job creation and economic development in Tennessee.

In conclusion, we have unwavering support for the state association. Supporting and actively promoting the establishment of a state association is an unequivocal imperative. Its profound impact stands to significantly enhance the nonprofit landscape, bringing about positive and transformative changes for all of Tennessee.

Sincerely,

Sara Baker and Elle Benson